



CBI  
Ministry of Foreign Affairs

# Welcome, this session starts at 10.00 CET

## CBI Webinar: Apparel – Inside the mind of a European fashion buyer

4 March 2021

**CBI, Centre for the Promotion of import from developing countries (CBI.eu)**

*Part of the Netherlands Enterprise Agency (RVO.nl)*



# CBI Webinar: Inside the mind of a European fashion buyer

## We have 3 presenters today



**Frans Tilstra**

Market analyst with a focus on sustainability, technical innovations and new business models. Uses market data to consult suppliers of textile and leather products on how to be successful today by preparing for the fashion industry of tomorrow. The time of making important business decisions based on intuition (and being proud of it) has gone. Today's successful fashion companies operate on market data.



**Giovanni Beatrice**

A creative fashion entrepreneur building bridges between supply and demand. Supporting garment manufacturing organizations on strategy, marketing and CSR. Collaborating with retailers and brands on sustainable global sourcing. I am an innovator with a focus on the implementation of original market developments and opportunities into existing organizations to create a competitive advantage. My commercial approach secures profitability.



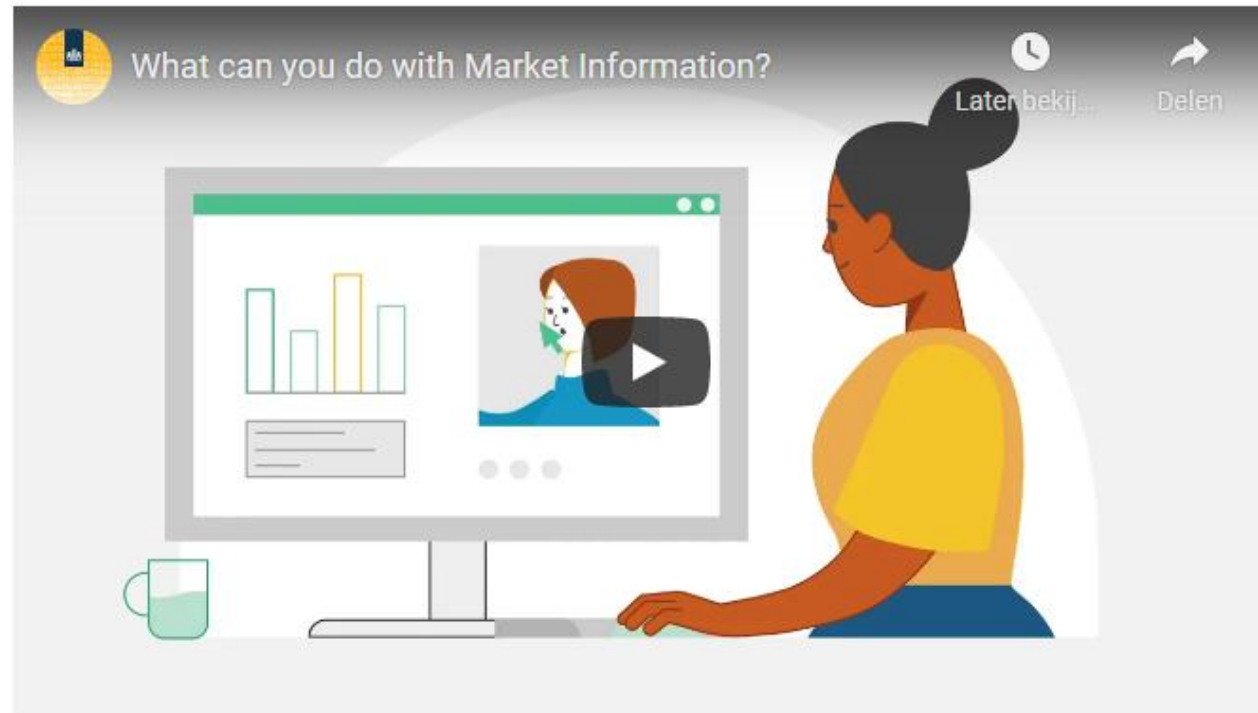
**Pieter van der Gaast**

Pieter has a long working history in sales for several European fashion brands. He has also been active as a buyer for Belgian fashion company JBC. Currently, Pieter works as an agent for several international apparel manufacturers and as a consultant advising companies on buying and their purchase strategy.



## What can you do with our Market Information?

English version



<https://youtu.be/hjTyMTiwUig>



# Programme

10:00-10:05	introduction by Thomas Vonk, CBI
10:05-10:15	how to find info on doing business with European buyers, by Frans Tilstra
10:15-10:20	Q&A
10:20-10:35	what are buyers looking for?, by Pieter van der Gaast
10:35-10:45	Q&A
10:45-11:00	interesting developments in specific categories: denim, dresses, swimwear, trousers, by Giovanni Beatrice
11:00-11:10	Q&A
11:10-11:15	closing remarks, by Thomas Vonk





# Where to find info on buyer requirements?

## Frans Tilstra

Market researcher with a special interest  
in sustainability and innovation

# Our approach

Desk research

Interviews with buyers

Interviews with sector  
associations



Expertise based on running  
CBI programmes



# Exporting apparel to Europe

Europe offers opportunities for exporters of garments and apparel. On this page you'll find information to help you get your garments or apparel products on the European market.

## Sector information

 [What is the demand?](#) [Which trends offer opportunities?](#) [What requirements should your product comply with?](#)

## Other sector information

- › [How to respond to COVID-19 in the Apparel sector?](#)

## Tips

- › [Tips to find buyers](#)
- › [Tips to do business](#)
- › [Tips to organise your export](#)
- › [How to apply new technologies to apparel?](#)
- › [How to deal with changes in the apparel supply chain?](#)

## Info for specific developing countries

- › [Morocco](#)
- › [Pakistan](#)
- › [Myanmar](#)

## News

- › [Europe is taking action to reduce microplastic pollution](#)
- › [Digitalisation can make apparel manufacturers stronger in times of crisis](#)
- › [Athleisure defines current fashion trends](#)
- › [How to increase your chances of exporting apparel to Europe](#)
- › [5 things you need to know if you want to export apparel to Europe](#)
- › [Running an apparel factory in times of coronavirus](#)
- › [Brexit delay continues uncertainty for apparel manufacturers](#)
- › [European apparel brands increasingly shifting production out of China](#)

## Promising export products

- › [50-plus Consumers](#)
- › [Adaptive Apparel](#)
- › [Apparel for Seniors](#)
- › [Babywear](#)
- › [Bodywear](#)
- › [Childrenswear](#)
- › [Denim](#)
- › [Dresses and Skirts](#)
- › [Leather Fashion Accessories](#)
- › [Natural Fibres](#)
- › [Outerwear](#)
- › [Pants](#)
- › [Recycled Fashion](#)
- › [Shapewear](#)
- › [Sportswear](#)
- › [Sustainable Apparel](#)

# Buyer requirements

Mandatory legal requirements:

- Product safety
- REACH
- Children's wear
- Flammability
- CE Marking
- Labelling
- Intellectual property rights
- CITES





# Buyer requirements (2)

## Non-legal mandatory Requirements:

- Sustainability
  - Materials
  - Processing
  - Garment manufacturing
  - Covid-19 requirements
- Packaging
- Payment terms
- Acceptable quality limits

amfori BSCI



Ø ZDHC



# Check it out

## CSR RISK CHECK

The CSR Risk Check tool is aimed at companies that are exporting to, importing from or have production facilities in foreign countries.

Start this (short) check and find out which international CSR risks your business activities are exposed to and what you can do to manage them.

**START THE CHECK**



[csrriskcheck.com](https://csrriskcheck.com)

# Buyer requirements (3)

Additional requirements:

- Product design and development
- Garment care preferences
- Communication
- Speed to market
- Flexibility
- Niche requirements



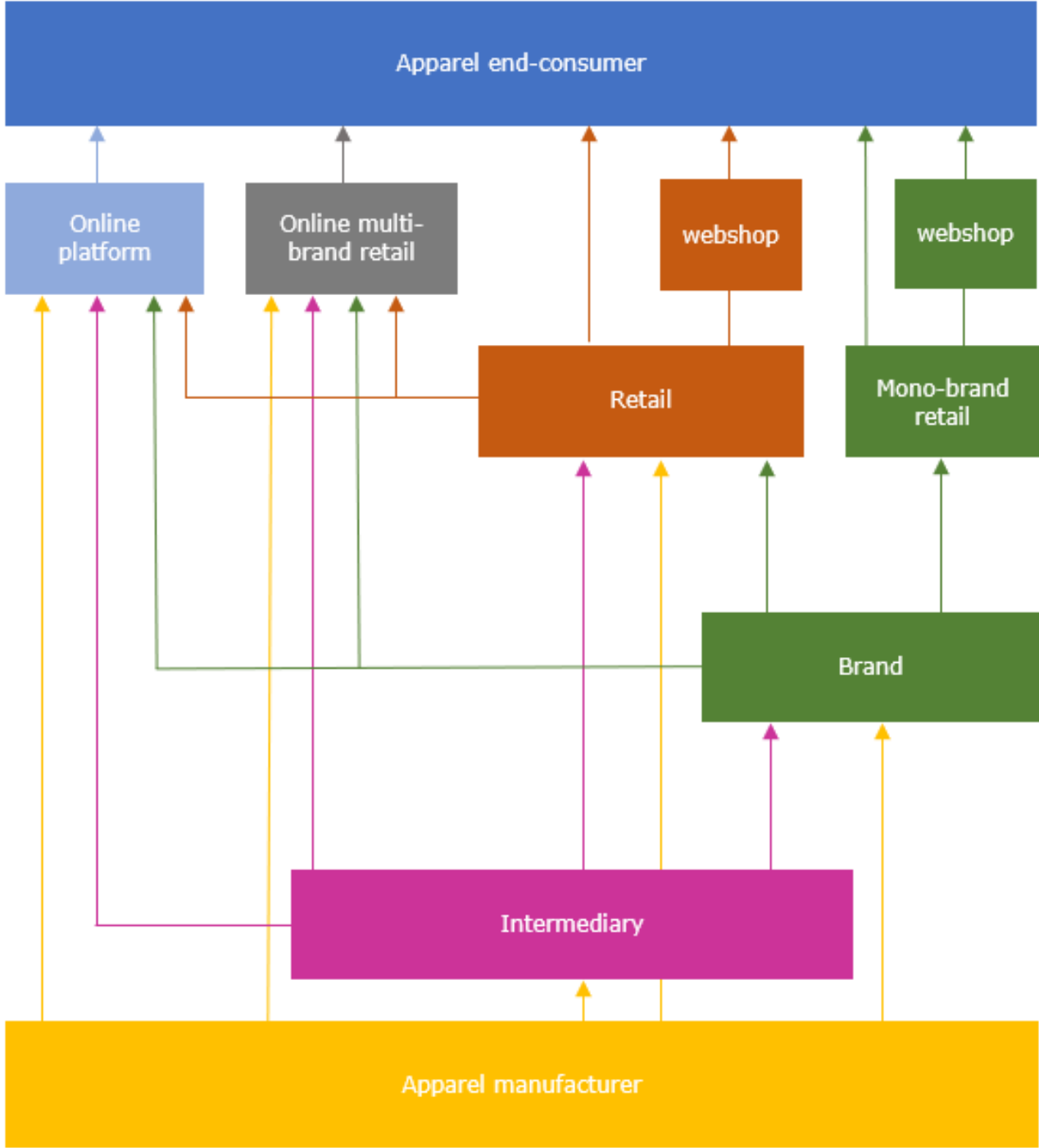


# Finding buyers

- Determine the right channel
- Search buyers that match your size, MOQ, price and quality level
- Find a niche
- Create a representative website
- Promote yourself online
- Check online databases
- Prepare for the meeting
- Follow up immediately
- Find an agent
- Let support organisations help you







**Determine the right channel**

# Doing business

- The effects of Covid-19
- Connect on a personal level
- Advertise your USP's
- Always be honest
- Present your products logically
- Substantiate your price offer
- Prepare for meetings
- Stay in contact
- What makes your buyer happy?
- Focus and expand





Our history and values



Our people



Services and standards



Brands we work with





# Organising exports

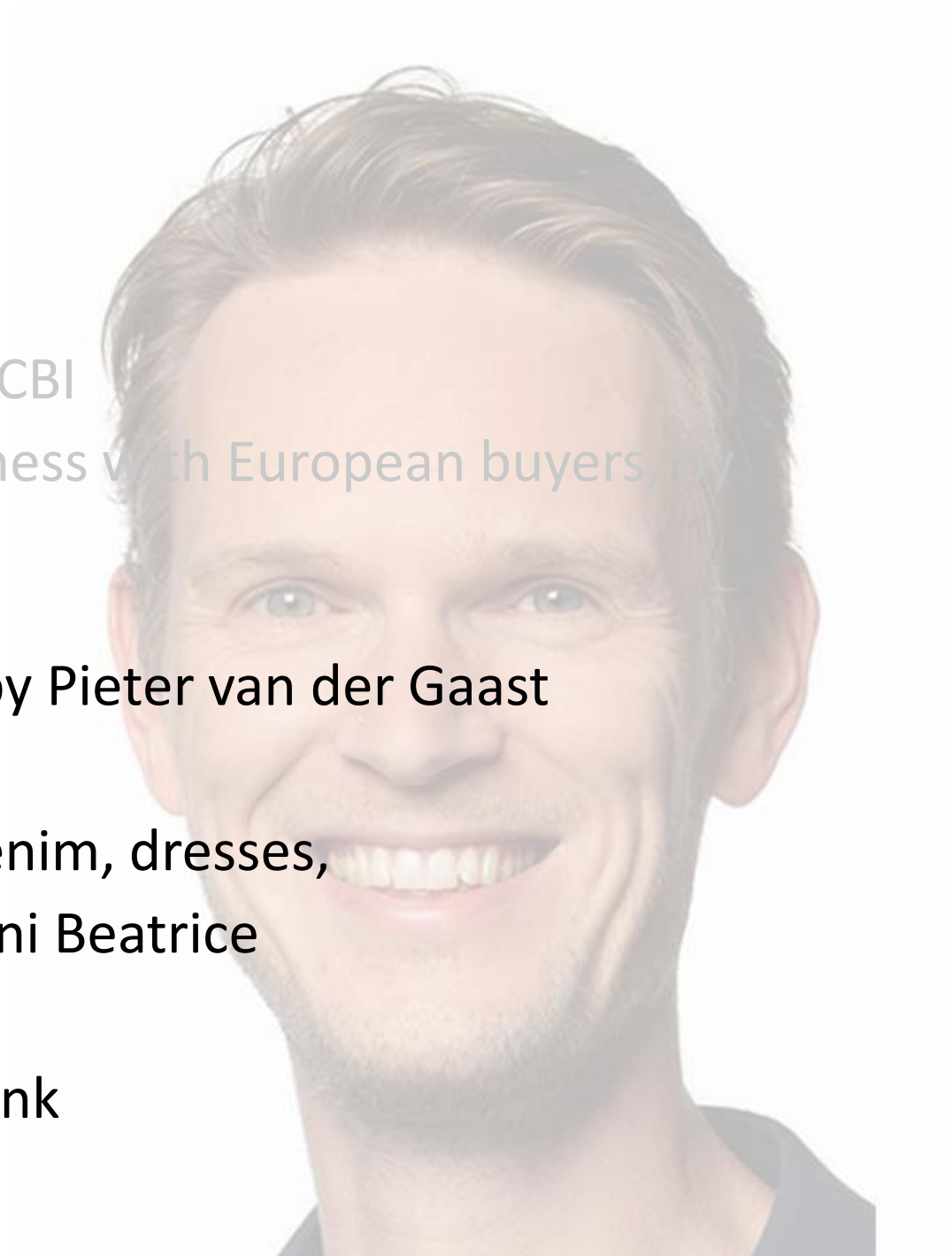
- Chose the right payment terms
- Shipment and delivery
- Type of transport
- Be smart on stock keeping
- Customs and paperwork
- Pack according to the buyer manual
- Minimise disputes over quality
- Check your contract
- Invest in a transparent supply chain





# Thank you for listening

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A close-up, high-contrast portrait of a man with light brown, wavy hair and a full, light-colored beard. He is looking slightly upwards and to the right with a thoughtful expression. The background is dark, making his face the central focus.

# What are buyers looking for?

## Pieter van der Gaast

30 years experience in buying, sourcing,  
sales and product development in the  
textile industry

# Companies I have work(ed) for



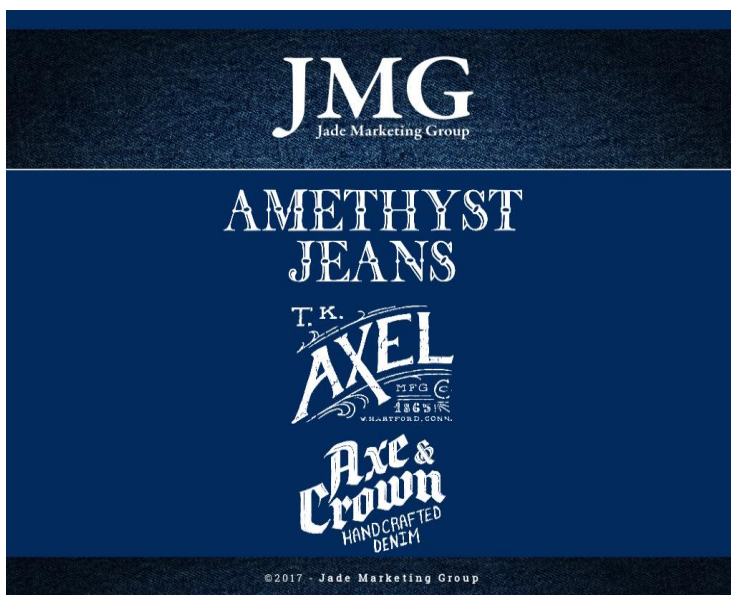
INTERSTAR MODES BV

stonefashion



BLACK BANANAS®

NETRACO



OPPO  
SUITS®

Mayerline  
BRUSSELS



# My situation

- Salesdirector Oriental Europe with focus on Dutch, Belgium and dach market's (specialised in sustainable production)
- Consultant for online and wholesale brand Blackbananas (outsourcing outerwear, circular knit, sportswear)
- Consultant for Fashion Xpress BD marketing strategy, sales strategy Selling stocklots for factories in China, Turkey and Bangladash (Covid stock) to (off price) retailers
- Fashion consultancy



# Retailers I have work(ed) with

jbc

ZARA

Bel&Bo

Carri's  
WELCOME HOME  
Paprika  
Sizes 44-54

on

TJX EUROPE | Primark | HOME SENSE

APRANGA  
GROUP

FUSSL  
Modestraße

zebra

Charles  
Vögele  
SWITZERLAND

WE  
WEFASHION.COM

terStal  
voordelige familiemode

LOLA  
L I Z A

METRO  
makro

KK  
KATAG  
THE FASHION PEOPLE

SOKOS

KESKO

THE STING

familia  
OFF-PRICE STORES

EURETCO

Varner  
VARNER GROUP

BRISTOL

Peek&Cloppenburg

COOLCAT®

V&D

C&A

Jola | mode

zalando

B breuninger

HEMA

CORTEFIEL

SUITSUPPLY

W  
wehkamp

C/S  
ST  
COSTES

# Brands I have work(ed) with



MEXX

noppies

JOSH V

TENSON  
A way of living since 1951

Greisha

O'NEILL

CARS JEANS

TERRE BLEUE.

Freebird

SIMPLE

ESPRIT

BSB

LES SOEURS



VANGUARD



INDIAN  
BLUEJEANS

C'est Beau  
la Vie!

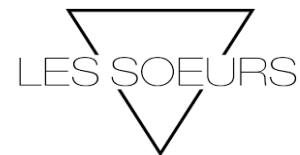
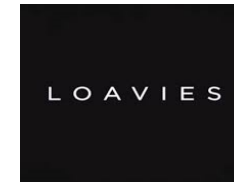


ARROW  
USA-1851

# The actual market

- Complex because of Covid-19 and closed stores
- More focus on CSR and more (new) rules (REACH etc)
- Sustainability is becoming more important but buyers do not (always) want to pay for it
- Buyers are looking for flexible suppliers with short lead times
- Difficulty to get insurance on clients
- Online market share is growing
- Increasing transparency (internet, LinkedIn, Facebook, Instagram)
- 'Push-and-pull' selling doesn't work (anymore)
- Big pressure on buyers to realise their (entry) margin
- Still many opportunities if you think outside the box

# New players





# Change = opportunity

- Think outside the box
- New marketing tools (Linkedin, clear overviews, presentations)
- Sell directly to the consumer by online platforms
- Work with stock yarns stock fabrics/ close contact with fabric/ yarn suppliers
- Never out of stock programmes
- Product focus (for example sustainable production)
- Offer styling and design
- Local production

# What are buyers looking for?

- Solutions and pro-active suppliers
  - CSR (BSCI, Accord, FAIRWEAR, et c)
  - Workable leadtimes
  - Partnership
- Flexibility
  - Design and fashion input
  - Companies that can deliver the right product on the right moment with the right margin, made in a good factory

# How to deal with this?

- Select your clients (breathe and think as your client)
- Clients you work with have to fit in your business model
- Work only with clients that click with you
- Visit your clients often and try to understand what they really want/ need

- Say no to things you are not good at
- Be open, honest and transparent
- Try to look for new market opportunities
- Make a good business and marketing plan and follow it

# The future

- The Covid-19 effect
- Payment situations: no credit limit (and what to do about it?)
- Shorter lead times, local production
- Flexibility

- Increasing transport costs
- Retail prices (rat race)
- Sustainability



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A close-up portrait of a man with dark hair, a beard, and glasses, smiling. He is wearing a dark jacket over a light-colored shirt. The background is a blurred green landscape under a blue sky.

Interesting developments in denim, dresses,  
swimwear, trousers, fashion sportswear  
and leather bags

Giovanni Beatrice



FORWARD  
IN FASHION

# Covid has changed the market demand

- Reduce risk (stock)
- Increasing online sales
- Increase flexibility
- Flexible MOQ
- Stock service
- Extended payment conditions



# Denim

*'Green' is the new gold*

## Sustainability

- Covid has influenced long term orders. Recovery will take time
- Green deal/denim deal Recycled content
- Organic cotton
- Eco-fibers (Hemp, Tencel, Modal, PLA, Milk, Seaweed, Soy)
- Waterless dying (foam dying, Kitotex, Jeanologia)
- Vegan 'Jacron paper' replacing leather patches
- Design for circularity (no metal rivets, no patches or re-usable)



# Today's niche is tomorrow's mainstream



## Jeans van Re/done

Merk: re/done  
Artikelnr: 140-3w7strt-blauw

### KLEUR

blauw ↕

### MAAT

25

26

27

28

29

30

[maattabel](#)

1 ↕

€319,95

IN SHOPPINGBAG 

## New business models:

Re-done, Re-use, Upcycle, leasing, Re-cycle, Refurbishing

Growing second hand market



# Competing countries: what makes the difference?

Bangladesh

Turkey

Pakistan

India

China

Tunisia

Cambodia

Morocco

First generation jeans long-term

Second generation jeans short-term



# Dresses and skirts

*'Green' is the new gold*

## Sustainable related trends

- Organic cotton
- Responsible wool standard
- Eco-friendly fibres
- Waterless dying
- Natural dyes
- Recycled content
- Bio degradable
- **New concepts**
- 3d printed dresses
- Re-cycled wedding dresses



# Product Developments

- On-trend materials such as organza, taffeta, tulle, crochet, mesh, lace, feathers, leather and 'vegan' leather.
- Special finishes such as metallic and fluorescent (neon) coatings and prints, preferably using sustainable techniques.
- Stretch fabrics for extra comfort.
- Fabrics with soil-resistant, breathing, waterproof, anti-bacterial or UV-protective properties for athleisure and active wear.
- Quick drying, easy iron and crease-resistant fabrics.

- Stay dark fabrics (colour fastness).
- Garment dying during production to increase flexibility.
- Popular silhouettes
- Rise of competing categories: athleisure, loungewear, trousers





# Today's niche is tomorrow's mainstream

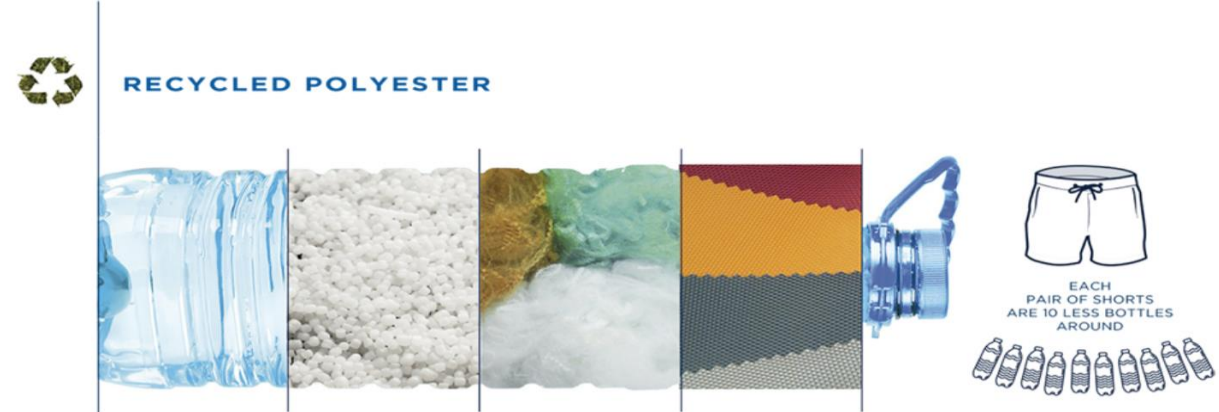
- Gala dresses (rental)
- Wedding dresses
- Retro styles
- Corporate skirts and dresses
- Hospital dresses/ uniforms (anti bacterial)
- Special sizes (big sizes)
- Adaptive wear (aging population)
- Modest wear (growing number in EU)
- Active wear, outdoor skirts



Women's Alzheimer's Kit (Daily Care)

# Swimwear

- Sustainability
  - Recycled content
    - Econyl, (fishing nets), Repreve, Miphan
    - Re-cycled polyester
    - Waterless dyeing
    - Sustainable waterproof coatings (Neoseed)
  - Natural dyes
    - Rubia, Fibre Bio, Greendyes, Adalberto
    - Recycrom (recycled dyestuffs)



# Product Developments

- Fabrics with UV-protective properties
- Fabrics and padding that enhance a consumer's shape
- Fabrics which provide long-lasting fit such as Lycra® T400®
- Performance increasing materials (for instance special knits that reduce drag, improve blood circulation or give extra support in specific body areas)
- Integrated wearable technologies (activity trackers, heart rate and blood pressure sensors, or sensors that let you keep track of your child or prevent them from entering deep water)
- (Sustainable) prints



# Today's niche is tomorrow's mainstream

Special sizes

Adaptive wear

Modest wear

Performance enhancing  
swimwear

UV protective swimwear



**EMMA KRISTINA SWIM**





# Competing countries

*New concepts make the difference*

China

Vietnam

Tunesia

Bangladesh

Cambodia

Sri Lanka



**Re-Verso™**

**Re.Verso™** is the identifying trademark of an **evolved supply chain**, composed of **Green Line** and **Nuova Fratelli Boretti**, to which selected transforming partners as **Filpucci**, **A. Stelloni Collection by Mapel** and **Antica Valseschio** are added to get yarns, fabrics and knitwear, and all together they create a unique new offer of **Re.Verso™**.

# Trousers

## Sustainability

- Recycled content
- Organic cotton
- Responsible wool standard
- Ecofriendly fibres
- Waterless dying
- Natural dyes



From nature - back to nature

Creating sustainable biomaterials

# Product Developments

- Blended fabrics, including stretch fabrics with elastane/ Lycra for extra comfort.
  - Different weaving and/ or knitting techniques such as mesh and houndstooth.
  - Innovative finishings that improve hand-feel or improve functionality such as quick-dry and easy ironing.
  - Prints, preferably using sustainable techniques.
  - Garment dying to increase flexibility.
- Popular silhouettes
  - Rise of competing categories: athleisure, loungewear, denim, second hand

# Today's niche is tomorrow's mainstream

Workwear

Made-to-measure

Special sizes

Adaptive wear

Modest wear

We make what you need



## ABOUT MUNRO TAILORING

Here at Munro Tailoring in Amsterdam, we're passionate about changing the way you buy and sell your suits, shirts, coats, shoes, jeans and neckwear for men.

Forget ordinary, ready-to-wear products for the masses. We believe in custom, one-of-a-kind items made exclusively for you and your customers. A new approach to retail that allows you to enjoy the freedom of realising your own specific needs and desires with a truly personal service at exceptional value for money.

Offering everything from classic formalwear to laid-back, casual-chic apparel, we design, develop and carefully construct CustomMade menswear. Contemporary, sharply tailored and with an eye for detail, we provide you with a nearly endless range of possibilities in order to create a unique wardrobe of CustomMade pieces for every man.



# Competing countries

Bangladesh  
China  
Turkey  
Pakistan  
Cambodia  
Vietnam

## Average Standard Minute Value (SMV) Comparison 2020

Bangladesh	€ 0,07
Pakistan	€ 0,074
India	€ 0,085
Moldova	€ 0,091
Myanmar	€ 0,112
Tunisia	€ 0,115
Morocco	€ 0,12
Macedonia	€ 0,128
China	€ 0,146
Jordan	€ 0,16
Portugal	€ 0,20
Poland	€ 0,214
Turkey	€ 0,215

# Fashion sportswear

*Sportswear is no longer only sportswear*

## **Start Moving: Bershka launches its first sportswear collection**

# Fusion of different worlds and functionalities



## Health-Tracking Designer Shirts

This Ralph Lauren Shirt Tracks Workout Progress and Health



## Performance-Monitoring Apparel (UPDATE)

Sensoria's Smart Running System is Unveiling at CES 2016



## Activity Tracking Compression Sleeves

The AIO Smart Sleeve is the First of Its Kind



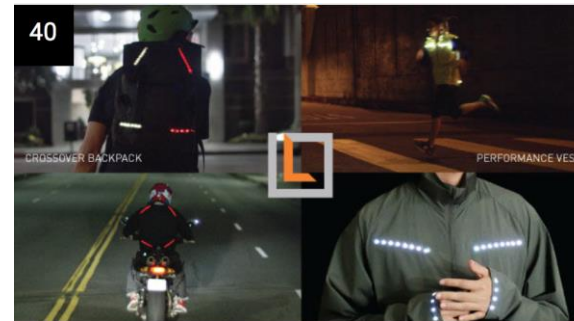
## Heat-Generating Unisex Hoodies

'G-Tech Apparel' Offers a Warmer Alternative to Normal Sweaters



## Text Messaging Hoodies

The Smart Hoodie Sends SMS Messages Based on Gestures



## Illuminating Athletic Vests

The Lumenus Sport Jackets and Backpacks Light Up for Night Workouts



## Player-Connected Rugby Jerseys

This Smart Jersey Will Allow Fans to Feel the Exhaustion of Players



## Wired Smart Jackets

# Leather bags

It's all about the leather

Chrome free

Recycle

Pineapple leather

Cactus leather

Mushroom leather

Bio fabricated leather

***Supply chain challenges***

Desertification

Animal cruelty

Supply chain transparency





# Main innovative trends

- **Transparency & Traceability**

- QR code
- Block chain

- **Circular Business Model**

- Reselling
- Recycling
- Refurbishment

- **Chemicals**

- Natural dyes
- Water saving technologies

- **Biodegradable**

- Packaging

- **Automation**

- Manufacturing speed
- Collecting data

- **New concepts**



# INNOVATIVE COMPANIES THAT MAKE A DIFFERENCE

- **Transparency & Traceability:**

- Bext360 (blockchain)
- Oritain
- Monochain
- Vechain
- Circular.Fashion

- **Circular Business Model/Reselling:**

- Tommy Hilfiger (Renewal Workshop)
- Patagonia
- C&A (Cradle to Cradle)
- Repack (re-use packaging)
- North Face (Refurbishment)
- Fast Feet Grinded
- Resortecs

- **New concepts:**

- Reverso
- Munro Tailoring
- Mud Jeans
- Puma new carton box
- Returnity
- Re-pack

- **Chemicals:**

- Nature Coatings (black pigment out of wood waste)
- Dropel (water repellent cotton)
- Archroma, Earth colours (natural dyes)
- Dyecoo
- Santanderina
- Cadel deinking

- **Biodegradable:**

- Pond
- Packaging: Tipa (biodegradable plastic)
- Puma (biodegradable sneakers)
- Tipa compostable packing

- **Recycle:**

- Wolkat
- Pure Waste
- Hallotex

- **Automation/data:**

- Tamicare (Cosyflex®)
- KC wearable technologies

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*Happy to work together in reaching results in  
sustainable economic development*



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